

Servus Feel Good Fund Application Overview

Applications are submitted through our online [Portal](#). To help you prepare, you can use this Word Document to draft your responses, save your work, and then copy your answers into the online form when you're ready to submit. **Please note that all final applications must be submitted through the online portal.**

SECTION ONE: ELIGIBILITY REQUIREMENTS

As Servus's Community Engagement program evolves we look for partnerships that bring people together, support communities and save people money, especially our members!

Community partnerships that help shape member financial fitness fall into these areas, please choose all that apply to this application:

- **Community Access** – Servus partners with local non-profit organizations to offer free or reduced admission fees for people to enjoy community and cultural activities or attractions.
- **Financial Literacy** – Servus is dedicated to helping people improve their financial fitness through financial education.
- **Mental Wellness** – Supporting organizations in our communities that benefit members, individuals, and families who are vulnerable to issues that support mental wellness.

Select all that apply

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1. Funding cannot be used for the following - are you seeking a grant for any of the following?

- Advertising
- Advocacy or lobbying organizations
- Contingency funds or capital campaigns
- Debt repayment
- Events or programs occurring outside of Alberta
- Film, video, TV or book productions
- For-profit organization
- Fundraisers for individuals or teams
- Individual sports teams
- Individual or groups fundraising for a third party
- Infrastructure cost
- Operating expenses
- Political initiatives, events or organizations
- Religious initiatives, events or organizations
- Support for individuals
- Support of elite sports teams
- Unregistered organizations or businesses

Please note – Applications must be submitted through the online portal and will not be accepted in any other formats. Any applications that are delivered through any other communication channels will not be evaluated.

- ☐ Yes - *This does not meet our eligibility requirements, please refer to Servus.ca as we will not accept this application*
- ☐ No

2. Is your program or organization based within Alberta and supports Albertans?

- ☐ Yes
- ☐ No – *This does not meet our eligibility requirements, please refer to Servus.ca as we will not accept this application*

3. How is the organization classified?

- ☐ An organization registered as having charitable status by the Canadian Revenue Agency (CRA)
- ☐ Provincially registered not for profit organization
- ☐ Municipality or public institution
- ☐ Community group, society or association
- ☐ Unregistered community organization - Does not meet eligibility and cannot continue the application form
- ☐ Individual seeking funds - Does not meet eligibility and cannot continue the application form
- ☐ Private organization - Does not meet eligibility and cannot continue the application form
- ☐ For-profit organization - Does not meet eligibility and cannot continue the application form

SECTION TWO: ORGANIZATION OVERVIEW

Enter the name of the beneficiary organization or registration number and select from the list provided.

Contact Information

1. Are you the primary contact for this request?

- ☐ Yes
 - First name
 - Last name
 - Title (optional)
 - Email
 - Re-enter the primary contact's email for confirmation
 - Phone number
 - Pronouns (optional)
- ☐ No – Please provide details of the **primary contact** at your organization for this request below.
 - First name
 - Last name
 - Title (optional)

- Email
- Re-enter the primary contact's email for confirmation
- Phone number
- Pronouns (optional)

If you select "no" – you will be asked to provide **your** contact details below. All email communications about the status of this proposal will only be sent to you.

Organization Details

1. **Should this application be approved, please outline the organization's name and the person receiving the payment.** Please ensure your information is correct to avoid potential delays in payment.

Please note: Cheques cannot be made payable to individuals.

- Organization's Legal Name
- Address line 1
- Address line 2 (optional)
- City
- Province
- Postal Code
- Phone Number
- Email
- Re-enter the organization's email for confirmation

2. **List organization's social media and website info: (*Mandatory at least one*)**

- ☐ Website
- ☐ Facebook Page
- ☐ LinkedIn
- ☐ Instagram Profile
- ☐ X Profile
- ☐ Provide other social networking profile the organization uses; if applicable

3. **What is the organization's relationship with Servus?**

- ☐ Member
- ☐ No formal relationship
 - Do you want someone from Servus to contact you to learn more about our products and services?
 - ☐ Yes
 - ☐ No

SECTION THREE: REQUEST PROFILE

1. **What is the name of the initiative you are seeking funding for?**

2. **Please describe your initiative and include the goals, community benefit and expected number of beneficiaries?**

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3. Please indicate which community will primarily benefit from your initiative (choose from the drop-down menu).
4. Provide details on where (e.g. community, region, etc.) your initiative will primarily take place
5. What is the date(s) of your initiative?
 - ☐ Initiative Start Date
 - ☐ Initiative End Date (if applicable)

Reminder - If the event occurs in less than 8 weeks from when you submitted the application, we cannot guarantee review of your application.

6. What type of request are you making?
 - ☐ Program support
 - ☐ Sponsorship of an event or initiative
 - ☐ Donation

7. Are you requesting volunteers from Servus to support this project? Please note that volunteers are not guaranteed.
 - ☐ Yes
 - ☐ No

If you selected yes, please indicate specific volunteering details you are requesting:

- Number of volunteers needed
- Length of shift

Please describe the volunteer opportunities for Servus employees.

8. What are you requesting (you only need to fill out what you select. It's automatically "branched")?
 - ☐ Cash Value
 - Please enter the amount you are requesting
 - ☐ In Kind
 - Please indicate specific items you are requesting and for what purpose. Description of in-kind item and the approximate value:

- ☐ Cash Value and In-Kind

9. What are the recognition opportunities available for Servus? Select all that apply.

(Depending on what you select, additional information will be requested)

- ☐ **Brand Recognition (Select all that apply)**
 - ☐ At event
 - ☐ On-site signage
 - ☐ Promotional material
 - ☐ Other:
- ☐ **Onsite activation (Select all that apply)**
 - ☐ Giveaways
 - ☐ Signage
 - ☐ Volunteers
 - ☐ Others
- ☐ **Social media recognition (Select all that apply)**
 - ☐ Tag Servus on social posts?
 - ☐ Yes
 - ☐ No
 - ☐ How often?
 - ☐ Which platforms? Select all that apply
 - ☐ Facebook
 - ☐ Instagram
 - ☐ LinkedIn
 - ☐ TikTok
 - ☐ YouTube
- ☐ **Tickets**
 - ☐ How many?
- ☐ **Website Recognition**
 - ☐ Please visit our [website](#) to access our branding guidelines.
- ☐ **Other**
 - ☐ Please specify

10. Has Servus or connectFirst Credit Union provided funding in the past three years for your organization?

- ☐ Yes
 - ☐ How many years have you received funding?
 - ☐ What was the funding provided for?
 - ☐ Approved Amount
- ☐ No

11. What is your role in relation to this request? Select all that apply.

- ☐ I am employed by the organization that will benefit from the support
- ☐ I am a volunteer for the organization that will benefit from the support
- ☐ I am a Servus Employee
 - ☐ What is your relationship with the applying organization?
- ☐ I am related to a Servus Employee
 - ☐ Please provide the name of the Servus employee

12. What is the main focus or mission of your organization? (Choose from the list below)

- ☐ **Agriculture & Rural Development** – Supporting farming communities through development or capacity building initiatives.
- ☐ **Arts & Culture** – Promoting visual arts, literature, performing arts, or community heritage.
- ☐ **Civic Investment** – Advancing social issues through leadership, advocacy, or community impact initiatives.
- ☐ **Community Events** – Organizing gatherings that focus on bringing community members together (e.g., festivals, local events).
- ☐ **Disaster Relief & Response** – Providing aid for natural disasters within Alberta (e.g., donations, fundraising).
- ☐ **Education** – Supporting learning opportunities for all ages and may include formal education programs, or awareness building to address a social issue.
- ☐ **Emergency Services** – Enhancing community safety via initiatives such as emergency preparedness.
- ☐ **Environment** – Addressing environmental issues or animal protection efforts.
- ☐ **Health & Wellness** – Supporting healthcare, disease prevention, and well-being initiatives.
- ☐ **Social Enterprise & Cooperatives** – Empowering community-driven, member-based, or social impact organizations.
- ☐ **Social Services** – Addressing basic needs like housing, food security, and poverty reduction.
- ☐ **Sports & Recreation** – Encouraging participation in sports, fitness, and recreational activities.
- ☐ **Other – Please specify**

SECTION FOUR: REQUEST DETAILS

1. Who is your target audience? (Please choose all that apply)

- a. 2SLGBTQIA+
- b. BIPOC (Black, Indigenous, People of colour)
- c. Children and youth
- d. Families
- e. General Public
- f. Men
- g. Women
- h. New to Canada
- i. Seniors
- j. People with disabilities
- k. Other

2. Have you spoken to anyone at Servus about this application?

- a. Yes
 - a. Please provide the name of the Servus employee
- b. No

3. How many years has this initiative taken place for?
4. How did you hear about Servus's community engagement program? Select all that apply.
 - a. Blog
 - b. Facebook
 - c. Google, Bing or other search engine
 - d. Instagram
 - e. LinkedIn
 - f. Other Servus Partners
 - g. Publication
 - h. Referral
 - i. Servus employee
 - j. Servus.ca
 - k. Tik Tok
 - l. YouTube
 - m. Other
5. Please provide the date when any marketing materials are required.
6. What opportunities could Servus provide that would contribute to the financial wellness of your organization or clients? (Examples could include seminars, workshops, guest speaking, guest blogging, mentoring, etc.)
7. Please describe any opportunities to provide reduced fees or free access through this contribution (if applicable)
8. Please share any additional information (dignitaries attending, schedule, etc.)
9. Please attach any documents you feel will support your application. If you have any sponsorship packages, letters of support, fulfillment reports, etc., please upload the files (up to 20MB)

Please remember that it can take up to 8 weeks for us to review your application. Once your application is reviewed, we will let you know via email if it is accepted for funding.

Please submit the final application on our online Grants Portal.